

Recent IPO Updates:

FII/DII Activity (in ₹crores)	
FII (Cash)	-1,561.62
DII (Cash)	3,036.68
FII (Index Futures)	-2,057.49
FII (Stock Futures)	714.06
FII (Index Options)	-16,628.33
FII (Stock Options)	265.83

- ICICI Prudential AMC plans a ₹10,000 crore IPO via offer for sale, managed by 17 banks. It will be India's sixth listed mutual fund company.
- Steamhouse India, an industrial steam and gas supplier, has confidentially filed IPO papers aiming to raise up to ₹700 crore. The company plans nationwide expansion.
- In H1 2025, 118 companies filed DRHPs seeking to raise ₹1.6 trillion, up from 52 filings in H1 2024, driven by a strong appetite for valuations.
- A dozen Indian startups, including Meesho, Physics Wallah, Pine Labs, and Groww, plan to raise over ₹18,000 crore via IPOs in 2025, reflecting strong market confidence.

Global Market Snapshot	
Dow Jones	44,484.42 (▼ -0.02)
S&P 500	6,198.01 (▼ -0.11)
Nasdaq	20,202.89 (▼ -0.82)
Gift Nifty	25,531.00 (▼ -0.49)
Nikkei 225	39,762.48 (▼ -0.56)
Hang Seng	24,221.41 (▲ 0.62)

P.E. & Funding Updates:

- CIMware, a deeptech startup, raised \$2.3 million pre-Series A funding led by Transition VC to scale hardware, R&D, and global expansion for its patented data center module.
- IORA Ecological Solutions raised ₹8.5 crore debt funding to expand its MegCare agroforestry program in Meghalaya, benefiting 80,000 farmers through carbon finance and land restoration.
- Astrophel Aerospace, a Pune-based deeptech startup, raised ₹6.84 crore pre-seed funding to develop reusable semi-cryogenic launch vehicles for small satellites and expand R&D capabilities.

Macro Data		
Brent Crude	\$69.11	(▲ 2.98)
Gold	₹97,720.00	(▲ 0.14)
Silver	₹107,600.00	(▲ 0.82)
Dollar Index	96.78	(▲ 0.10)
INR/USD	85.71	(▲ 0.21)
India 10Y Bond Yield	6.36	(▼ -0.47)
US 10Y Bond Yield	4.28	(▲ 0.94)

- Loopworm, a Bengaluru biotech startup, raised \$3.25 million pre-Series A funding to commercialize its silkworm-based protein platform for diagnostics, animal vaccines and global expansion.

Business & Economic Updates:

- The RBI panel is expected to advise keeping the existing 4% inflation target with a 2%-6% tolerance, maintaining stability in India's monetary policy framework.
- Foxconn has recalled over 300 Chinese engineers from its Indian iPhone factories, disrupting iPhone 17 production. This move, linked to China's tech transfer restrictions, may delay Apple's India manufacturing plans.
- The new US-Vietnam trade deal imposes a 20% tariff on Vietnamese exports and a 40% tariff on transshipped goods, raising caution for India's trade talks.

Geopolitical Updates:

- Iran's president has signed a law suspending cooperation with the IAEA after US and Israeli airstrikes, restricting inspector access and hindering nuclear program oversight.
- The US says its recent airstrikes on Iranian nuclear sites have degraded Iran's nuclear program by one to two years, though some experts remain skeptical about the extent of the setback.

Indian Market		
BSE Sensex	83,409.69	(▼ -0.34)
NIFTY 50	25,453.40	(▼ -0.35)
BSE SENSEX 50	26,594.25	(▼ -0.34)
NIFTY NEXT 50	68,729.80	(▼ -0.29)
BSE SENSEX Next 50	85,323.84	(▼ -0.25)
NIFTY BANK	56,999.20	(▼ -0.80)
BSE BANKEX	63,690.77	(▼ -0.69)
NIFTY FINANCIAL SERVICES	26,861.70	(▼ -0.97)
BSE FINANCIAL SERVICES	12,791.70	(▼ -0.92)
NIFTY MIDCAP SELECT	13,440.50	(▲ 0.18)
BSE MIDCAP	46,735.32	(▼ -0.18)
INDIA VIX	12.44	(▼ -0.72)

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